



**BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA**

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Application of Southern California Edison
Company (U 338E) for Approval of its Energy
Savings Assistance and California Alternate Rates
for Energy Programs and Budgets for Program
Years 2015-2017.

Application 14-11-007
(Filed November 18, 2014)

And Related Matters.

Application 14-11-009
Application 14-11-010
Application 14-11-011

**MONTHLY REPORT OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ON
LOW-INCOME ASSISTANCE PROGRAMS FOR DECEMBER 2020**

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January 21, 2021

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This is the twelfth monthly report for program year (PY) 2020. The purpose of this report is to consolidate activity for the California Alternate Rates for Energy (CARE) Program and Energy Savings Assistance (ESA) Program and provide the California Public Utilities Commission's Energy Division with information to assist in analyzing the low-income programs.

This report presents year-to-date ESA Program and CARE Program results and expenditures through December 31, 2020 for San Diego Gas & Electric Company.

Respectfully Submitted,

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San Diego Gas & Electric Company

Energy Savings Assistance (ESA) Program

And

California Alternate Rates for Energy (CARE)

Program

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ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

1. ESA PROGRAM EXECUTIVE SUMMARY

1.1 ESA Program Overview

COVID-19 Program Impacts

On October 30, SDG&E notified its contractors and Energy Division that the Post Pandemic Return to Service (PPRS) credit earning period would begin on December 1, 2020 and end on May 31, 2021.¹ SDG&E has five contractors who accepted advance payments and are eligible to earn PPRS credit.

In December, SDG&E Outreach and Assessment (O&A) contractors continued to provide in-home enrollments and treatments plus offered virtual enrollments to customers preferring to delay in-home treatment. While most program activity remained steady from previously reported activity, the increase in COVID related cases resulted in one contractor voluntarily closing ESA Program operations during the holidays to address employee safety in the field. All other contractors continued day-to-day operations with no additional COVID related impacts reported.

¹ See Resolution E-5074 at 10 which states “[T]he IOUs should provide a 30 day advance notice to contractors of when the six-month PPRS credit-earning period begins.” The IOUs consist of Pacific Gas and Electric Company, SDG&E, Southern California Gas Company, and Southern California Edison Company.

1.1.1 Provide a summary of the ESA Program elements as approved in Decision (D.) 16-11-022.

| ESA Program Summary through December 2020 | | | |
|--|---|-----------------------------------|----------|
| | 2020 Authorized / Planning Assumptions | Actual to Date² | % |
| Budget ³ | \$35,509,153 | \$15,711,479 | 44% |
| Homes Treated ⁴ | 23,761 | 9,303 | 39% |
| kWh Saved | 7,220,000 | 1,056,869 | 15% |
| kW Demand Reduced | 3,954 | 142 | 4% |
| Therms Saved | 420,000 | 32,954 | 8% |
| GHG Emissions Reduced (Tons) | 6,428 | 774 | 12% |

1.2 ESA Program Customer Outreach and Enrollment Update

1.2.1 Provide a summary of the ESA Program outreach and enrollment strategies deployed this month.

Below is a summary of ESA Program specific efforts conducted in December.

Joint CARE and ESA Programs marketing, education and outreach efforts are provided in section 1.2.2 below.

ESA Program Contractor Outreach

In December, SDG&E’s largest O&A contractor continued canvassing efforts, with some improvement in workforce issues reported in November. In

² Energy, demand, emissions savings reflects total savings from the ESA Program including California Department of Community Services and Development (CSD) leveraging and multifamily common area measure installations.

³ Budget authorized in approval of SDG&E Advice Letter 3250-E/2688-G dated December 27, 2018 for program years 2019 and 2020.

⁴ Total homes treated reflects homes that have been invoiced and paid and also includes CSD leveraging.

December, 347 enrollments were received through canvassing efforts, which resulted in no significant change from November activity. Contractors are also continuing to leverage SDG&E marketing efforts to make initial telephone contacts with customers to both enroll and schedule in-home appointments. Contractors were able to successfully enroll 920 customers in December, approximately 13% higher than November enrollments⁵.

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

In December 2020, SDG&E's ESA Program MF CAM implementer continued targeted marketing to potential ESA MF CAM properties, including re-syndication projects in SDG&E's service territory. To date, 64 properties have been treated in 2020 and 11 properties are currently receiving measure installations. In addition, there are a total of 10 properties pending energy assessments/audits. There have been minimal COVID-19 related impacts to the ongoing operations of the ESA MF CAM initiative as work can be completed via telephone or email and ongoing MF CAM installations can be completed without contractor contact with other people.

Information on the MF CAM initiative, including eligibility requirements, program flow, and contact information for Willdan Energy, SDG&E's implementer, is available on SDG&E's website page at

⁵ Enrollments are based on date of enrollment and may not be represented in the monthly reporting tables.

<https://www.sdge.com/businesses/savings-center/esa-common-area-measures-program>.

Language Line

Language Line[®] is utilized to make sure customers with limited English proficiency (LEP) have a channel in which to communicate with ESA Program contractors in the language of their preference. In December, nine customers were served by the Language Line.

| Language | Calls |
|-----------------|--------------|
| Arabic | 3 |
| Mandarin | 1 |
| Russian | 1 |
| Spanish | 2 |
| Vietnamese | 2 |
| TOTAL | 9 |

1.2.2 Customer Assistance Marketing, Education and Outreach for the CARE and ESA Programs.

Marketing, Education and Outreach (ME&O) activities summarized below represent joint efforts on behalf of the CARE and ESA Programs. SDG&E utilizes an integrated ME&O strategy by connecting with customers using general awareness marketing, direct marketing, and community outreach and engagement. The intent of the 2020 campaign is to make a connection with customers in order to drive conservation and provide monthly savings on their energy bill. The

campaign runs in English, Spanish and Asian languages and includes television, streaming radio, outdoor, print, digital (including paid search), email, direct mail and bill inserts, as well as a robust outreach program. In response to the COVID-19 pandemic, SDG&E implemented a number of changes to its customer assistance program ME&O efforts which will have an impact on ongoing campaign planning for these programs.

General Awareness Marketing

General awareness marketing allows SDG&E to connect with its customers through mass media efforts reaching both mass audiences and hard-to-reach populations including customers in rural areas, seniors, customers with special needs and multilingual/multicultural customers. The tactics for December 2020 are summarized in the following sections:

Streaming TV

In December, SDG&E ran 15 second TV spots on both English and Spanish streaming websites. The 15 second creative is the same as SDG&E's general market television creative that ran earlier in the year.

Print Advertising

The print advertising campaign concluded in November 2020 and there was no activity for December 2020.

Online Advertising

In 2020, SDG&E planned a digital advertising campaign that began in February and ended in December. For the month of December, Paid Search garnered 40,859 impressions with a click-through-rate (CTR) of 21 percent (%). Paid Social ads did not run in December. Banner Display Ads for December had 5,847,623 impressions with a CTR of 0.28%. Native online advertising had 568,048 impressions with a CTR of 0.12%. ESA-specific online advertising ended in December. CARE-specific online advertising commenced in March and ended in December. The ESA Program leverages customer leads from the CARE online enrollment process.

Social Media

Using e-newsletters, website posts, and social media channels, the Energy Solutions Partner Network shared 241 customer assistance messages in December to an audience of more than 416,000 followers. SDG&E's social media profile also posts messaging to an audience of more than 40,000 followers. These messages are then able to be redistributed to other networks on social media.





Direct Marketing

In December 2020, direct marketing efforts included the following tactics:

Direct Mail

SDG&E continued direct mail efforts and sent 6,995 postcards to promote the ESA Program to potential customers.

Email

SDG&E sent a December e-mail to promote the ESA Program to potential customers, which was sent to 32,401 customers with a 35% Open Rate and 3% click-through rate.

Live CARE Call Campaign

SDG&E's third-party contractor, The Harris Group (THG), called targeted customers to enroll in the CARE Program.⁶ The campaign provides SDG&E with a way to directly connect with customers in low-income and hard-to-reach areas. THG provides education about the CARE and ESA Programs and assists customers in completing program application forms. Outbound call activities in December 2020 generated the following numbers:

| The Harris Group | |
|------------------------------------|-------|
| ESA Leads | 0 |
| CARE Enrollments | 1,846 |
| CARE Recertifications ⁷ | 2 |

Community Outreach & Engagement

Energy Solutions Partner Network

SDG&E works closely with a network of over 190 community-based organizations (CBOs) to connect customers to the CARE and ESA Programs.

⁶ THG is a Diverse Business Enterprise (DBE) vendor and a woman-owned business.

⁷ Since March 4, no customers are required to recertify, and SDG&E has not removed any customers from the CARE program resulting from recertification. Customers can manually request to recertify but are automatically placed in the COVID protection category.

These organizations represent the diversity of SDG&E’s customers within its service territory. A majority of these organizations are small, grassroots agencies serving customers that are multicultural/multilingual, seniors, veterans, special needs, and Limited English Proficient (LEP) audiences. These partners help educate and enroll customers in low-income programs utilizing a variety of tactics including messaging through e-mail and social media channels such as Facebook, Twitter, and Instagram, posting information on their websites, providing booth space at events, and hosting enrollment day fairs at their locations. In December 2020, SDG&E’s partner outreach activities resulted in the following activities:

| Energy Solutions Partner Network | |
|---|---|
| ESA Leads | 0 |
| CARE Enrollments | 4 |
| CARE Recertifications ⁸ | 5 |

Partner Spotlight

In December 2020, the SDG&E Customer Solutions Outreach Team participated in 7 events, presentations, and trainings/workshops, 2 of which were virtual, that featured information and enrollment in energy solutions programs, services and tools. Many of these activities were hosted by SDG&E’s partner network and included drive through events, such as food drives, where information was shared in a safe manner. Outreach activities were focused on engaging customers with

⁸ Since March 4, no customers are required to recertify, and SDG&E has not removed any customers from the CARE program resulting from recertification. Customers can manually request to recertify but are automatically placed in the COVID protection category.

solutions such as the CARE and ESA Programs and reached over 21,000 people in December.

Energy Solutions Partner Activities

December Nights

The annual December Nights holiday festival at Balboa Park was re-imagined this year, due to COVID, and featured a festive drive-through food event that took place December 4 through 6. This event was hosted by the City of San Diego and featured 30 food vendors from previous years along with several new ones, offering drive-through meal service. San Diego Gas & Electric was a title sponsor and supported the event by supplying PPE kits to the first 1,500 attendees. SDG&E also displayed banners with information on its Customer Assistance programs, including CARE and Medical Baseline.

Lawrence Family Jewish Services

On December 14, Outreach presented to 23 Lawrence Family Jewish Services Senior Club members. The presentation included information on Customer Assistance programs, Energy Efficiency, payment options, Public Safety Power Shutoff, and SDG&E's COVID response.

Year-End Partner Recognition Event

On December 16, the Outreach team hosted its Year-End Partner Recognition Event. Over 100 Energy Solutions Partners were in attendance in this virtual presentation and received a re-cap on 2020 accomplishments and activities related

to CARE, ESA, Medical Baseline, Energy Efficiency, Public Safety Power Shutoffs and payment options. While COVID posed many challenges and caused partners to change their overall outreach approach, the Energy Solutions Partner network played a critical role in disseminating information to their respective communities and assisted SDG&E's Outreach team with over 4,500 activities throughout 2020.

Multicultural Outreach

To continue efforts to reduce potential barriers for customers in the rural, multicultural/multilingual, and special needs segments, as well as to increase education and program enrollments, SDG&E pairs multicultural contractors with employees that are fluent in various languages to help staff events and presentations. These contractors are fluent in the following languages: Spanish, Chinese, Aramaic/Arabic, and other languages as requested. During December 2020, SDG&E did not participate in any multicultural community outreach events due to the COVID-19 pandemic.

Other Customer Engagement Efforts

Subject to SDG&E's COVID-19 pandemic response addressed above in section 1.2.2, SDG&E has several other customer engagement efforts to educate, enroll, and provide direct service to its customers. These efforts include direct service from SDG&E's Customer Contact Center (CCC) and Payment Offices, as well as the distribution of materials through other SDG&E customer-facing

groups/programs and field services teams. Updated information as it relates to ongoing customer engagement and the impacts of the COVID-19 pandemic will continue to be provided in subsequent monthly reports.

SDG&E Customer Contact Center (CCC), Branch Offices, and Payment Offices

SDG&E’s CCC, Branch Offices, and Payment Offices promote and offer the CARE and ESA Programs to potentially eligible customers. SDG&E also promotes these customer assistance solutions at its Authorized Payment Locations (APLs). Additionally, the Outreach team assists at Branch Office locations on a seasonal basis to help enroll customers. On March 20, SDG&E closed the branch offices to the public over concern of the COVID-19 pandemic. Branch offices are still accepting CARE applications at the building drop box. Customers were urged to contact SDG&E’s CCC or go online to resolve utility issues.

In D.16-06-054, SDG&E received Commission authorization for its CCC’s Energy Service Specialists to enroll customers directly into the CARE Program over the telephone. In December 2020, SDG&E’s CCC and Branch Office generated the following applications and leads over the telephone:

| | CCC | Branch Office |
|-----------------------|------------|----------------------|
| ESA Leads | 2 | 0 |
| CARE Enrollments | 4 | 0 |
| CARE Recertifications | 0 | 0 |

1.3 Leveraging Success Evaluation, Including CSD

Single-Family Affordable Solar Housing (SASH) Program

SDG&E works with GRID Alternatives to enroll customers in the ESA Program based on participation in the SASH Program. Once approved, contractors install all feasible ESA Program measures in the home prior to the SASH Program's installation of a solar system. SDG&E reached out to GRID via email for a status update on the bi-annual process for this activity, however no additional list has been received as of December 2020. In addition, GRID requested supplemental information on the status of ESA activities generated from the initial GRID list provided, which SDG&E is preparing. Through December, SDG&E enrollments remain at 11 customers through SASH leveraging efforts.

Additionally, SDG&E provided GRID with a draft Non-Disclosure Agreement (NDA) for additional data sharing efforts to be conducted for the DAC-SASH program. Discussions have been scheduled for early January to further discuss the NDA and future program activities.

Furthermore, D.16-11-022 required the utilities to provide GRID Alternatives with information on CARE High Energy Usage (HEU) customers who have participated in the ESA Program. Due to a moratorium on CARE HEU during the COVID-19 pandemic, there were no leads generated and provided to GRID Alternatives during the month of December.

As part of SDG&E's leveraging agreement with San Diego County Water Authority (SDCWA), SDCWA reimburses SDG&E for water measures installed as part of the ESA Program in homes where customers have an active SDCWA account. This agreement will continue until December 31, 2020 or until SDCWA's funds are exhausted. SDG&E is continuing the partnership in 2021 and will be partnering on an updated agreement with SDCWA. In December, SDG&E did not submit any invoices to SDCWA for water saving measures.

1.3.1 Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented? What were the results in terms of new enrollments?

SDG&E continues to partner closely with local Low-Income Home Energy Assistance Program (LIHEAP) agencies to improve leveraging opportunities between CSD's LIHEAP and the ESA Program. Both San Diego LIHEAP contractors continued enrollment efforts. LIHEAP agencies have also received additional payment assistance funding, which is expected to increase the leveraging opportunities between the two programs. In December, LIHEAP organizations generated 162 leads for the ESA Program and enrolled 84 customers.

1.4 Workforce Education & Training (WE&T)

1.4.1 Please summarize efforts to improve and expand ESA Program workforce education and training. Describe steps taken to hire and train low-income workers and how such efforts differ from prior program years.

SDG&E did not conduct any training in conjunction with WE&T efforts in December 2020.

1.5 Miscellaneous

1.5.1 ESA Program Studies

2022 Low Income Needs Assessment (LINA) Study

Southern California Edison Company (SCE) is managing the contract for the next statewide LINA study. In December, SCE continued contract negotiations with the study team's selected bidder.

Non Energy Benefits (NEB) Assessment

The draft report was completed and posted for stakeholder review and a stakeholder webinar to present the results was scheduled for January 6, 2021.

1.5.2 ESA Program Pilot

SDG&E is not currently conducting any pilots.

2. CARE EXECUTIVE SUMMARY

2.1 CARE Program Summary

2.1.1 Please provide CARE Program summary costs.

| CARE Budget Categories | Authorized Budget ⁹ | Actual Expenses to Date | % of Budget Spent |
|--|--------------------------------|-------------------------|-------------------|
| Outreach | \$3,254,171 | \$2,585,404 | 79% |
| Proc., Certification and Verification | \$517,211 | \$583,416 | 113% |
| Post Enrollment Verification | \$363,667 | \$141,364 | 39% |
| Information Tech./Programming | \$1,719,900 | \$738,543 | 43% |
| Pilots-CHANGES | \$267,733 | \$228,253 | 85% |
| Regulatory Compliance | \$303,653 | \$437,376 | 144% |
| General Administration | \$836,246 | \$676,556 | 81% |
| CPUC Energy Division Staff | \$57,852 | \$89,431 | 155% |
| Cooling Centers ¹⁰ | \$0 | \$(42,048) | 0% |
| Total Expenses | \$7,320,433 | \$5,438,295 | 74% |
| Subsidies and Benefits ¹¹ | \$122,423,531 | \$139,614,300 | 114% |
| Total Program Costs and Discounts | \$129,743,964 | \$145,052,595 | 112% |

⁹ Budget authorized in approval of SDG&E Advice Letter 3250-E/2688-G dated December 27, 2018 for program years 2019 and 2020.

¹⁰ The funding for SDG&E's Cool Zones is no longer under the CARE program. See D.17-12-009 at Ordering Paragraph 114. The \$(42,048) represents 2019 Cooling Centers expenses charged to the CARE program in 2019 and correctly removed in 2020 per D.17-12-009.

¹¹ Reflects Subsidies and Benefits as authorized in Advice Letter 3440-E and Advice Letter 2815-G, effective January 1, 2020.

2.1.2 Provide the CARE Program penetration rate to date.

| CARE Penetration | | |
|------------------------------|---|-------------------------|
| Participants Enrolled | Eligible Participants¹² | Penetration Rate |
| 336,018 | 302,245 | 111% |

2.2 Outreach

2.2.1 Discuss utility outreach activities and those undertaken by third parties on the utility’s behalf.

In December 2020, marketing and outreach efforts generated 3,438 completed CARE applications and 1,891 new enrollments/recertifications for the program.

Below is a summary of CARE specific outreach efforts.

Direct Marketing

Direct Mail

In December 2020, SDG&E continued the bill comparison campaign by mailing a comparison letter to 9,122 potential CARE customers. The letter compares a customer’s average bill total for the last 12-months to what it would have been had they been enrolled in CARE receiving 30% or more off their energy bill.

Customers are encouraged to call SDG&E’s toll-free enrollment number or to apply through SDG&E’s online application.

¹² On March 17, 2020, Pacific Gas and Electric Company (PG&E), on behalf of the IOUs, filed the revised Annual Estimates of CARE Eligible Customers and Related Information. This number reflects estimates of SDG&E’s CARE Eligible Participants for 2020, as reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates.

Email

In December 2020, SDG&E continued with its Bill Comparison Nurture Campaign. The Nurture Campaign sends a series of automated, pre-written messages over a specified period to move customers closer to conversion. Contacts receive messages based on behavioral triggers and may receive up to three messages (including reminders) over a 30-day period, depending on engagement level. In December 2020, SDG&E sent out 26,030 emails (many of these reminders) which generated a 33% open rate and a 5% click through rate over the course of the month.

Community Outreach & Engagement

Community outreach and engagement efforts allow SDG&E to educate, connect and directly engage with customers in communities where they work and live. Outreach and engagement activities included events, presentations, workshops, trainings, partnerships with CBOs, and customized efforts.

CARE Partners (Capitation Agencies)

SDG&E partners with 19 social service agencies such as the Women's Infant & Children Organization (WIC) program, refugee assimilation organizations, and others to help enroll its hardest-to-reach customers. These organizations serve high-risk, low-income individuals and families with enrollment in state and federally funded assistance programs, including Cal Fresh, LIHEAP, Covered California, and California Lifeline. The partnering organizations are in diverse

low-income communities serving multicultural/multilingual, seniors, veterans, special needs, and LEP audiences and provide multilingual staffing. During the month of December, the following numbers were generated by the Capitation Agencies:

| Capitation Agencies | |
|-------------------------------------|-----|
| ESA Leads | 72 |
| CARE Enrollments | 115 |
| CARE Recertifications ¹³ | 5 |

Cool Zones

The San Diego County Cool Zone program ended the 2020 season on October 31 and the program is expected to resume in May of 2021. SDG&E filed its 2020 Cool Zone Annual Report on December 18, 2020. Due to COVID, nine of the 119 sites were open during the 2020 season with modifications including the requirement of masks, temperature checks and social distancing to protect public health. Information about CARE and a brochure “Stay Cool and Safe this Summer” with other energy- saving tips was provided to each Cool Zone facility for distribution to visitors. Additionally, if a qualified senior or disabled low-income customer expressed an inability to travel to a Cool Zone location, or had a concern about COVID exposure, a small portable electric fan was offered at no cost. In total, the County of San Diego Aging and Independence Services (AIS)

¹³ Since March 4, no customers are required to recertify, and SDG&E has not removed any customers from the CARE program resulting from recertification. Customers can manually request to recertify but are automatically placed in COVID protection category.

Department staff handled 840 calls and distributed 507 portable electric fans with a CARE application.

Women’s Infant & Children Organizations

In December, WIC offices were closed to in-person interactions because of COVID-19. The WIC offices, however, continue to field questions from their clientele via telephone.

County Health and Human Service Agency Collaboration

SDG&E collaborates with the County of San Diego Health and Human Services Agency (HHSA) to connect customers to programs like CARE. All field HHSA offices include a source coded CARE application in their new client intake packets. In December 2020, the following applications were received:

| HHSA | December | YTD |
|-------------------------------------|----------|-------|
| ESA Leads | 0 | 0 |
| CARE Enrollments | 56 | 1,015 |
| CARE Recertifications ¹⁴ | 59 | 399 |

2.3 CARE Recertification Complaints

2.3.1 Report the number of customer complaints received (formal or informal, however and wherever received) about their CARE recertification efforts, with the nature of the complaints and resolution.

¹⁴ Since March 4, no customers are required to recertify, and SDG&E has not removed any customers from the CARE program resulting from recertification. Customers can manually request to recertify but are automatically placed in the COVID protection category.

In December 2020, SDG&E did not receive any customer complaints regarding CARE recertification.

3. CHANGES REPORTING

In compliance with requirements outlined in D.12-12-011, SDG&E has updated CARE Table 10 information for the month of November 2020. As of June 1, 2020, CARE Table 11 reports have moved from monthly to quarterly for the 2020-2021 CHANGES Program contract year. Accordingly, activity for Q2 September-November CARE Table 11 data will be sent by CHANGES and reported in a subsequent report.¹⁵

¹⁵ SDG&E provides data from the previous month due to reporting delays from CHANGES which prevents SDG&E from reporting current month activity.

4. APPENDIX A – ESA AND CARE PROGRAM TABLES

ESA Program - Table 1 - Program Expenses

ESA Program - Table 1A – Program Expenses Funded from 2009-2016 “Unspent ESA Program Funds”

ESA Program - Table 2 - Program Expenses & Energy Savings by Measures Installed

ESA Program - Table 2A - Program Expenses & Energy Savings by Measures Installed (CSD Leveraging)

ESA Program - Table 2B - Program Expenses & Energy Savings by Measures Installed (Multifamily Common Area Measures)

ESA Program – Table 2B-1 – Eligible Common Area Measures List

ESA Program - Table 3A & 3B - Average Bill Savings per Treated Home/Common Area

ESA Program - Table 4A-1, 4B & 4C– Homes/Buildings Treated

ESA Program - Table 4A-2 - Homes Unwilling/Unable to Participate

ESA Program - Table 5A, 5B & 5C - Program Customer Summary

ESA Program - Table 6 - Expenditures for Pilots and Studies

ESA Program – Table 7 - Second Refrigerator, In-Home Education, MyEnergy/MyAccount Platform

CARE Program - Table 1 - CARE Overall Program Expenses

CARE Program - Table 2 - CARE Enrollment, Recertification, Attrition, and Penetration

CARE Program - Table 3a - CARE Post-Enrollment Verification Results (Model)

CARE Program - Table 3b - CARE Post-Enrollment Verification Results (High Usage)

CARE Program - Table 4 - Self Certification and Re-Certification

CARE Program - Table 5 - Enrollment by County

CARE Program - Table 6 - Recertification Results

CARE Program - Table 7 - Capitation Contractors

CARE Program - Table 8 - Participants as of Month End

CARE Program - Table 9 - Expenditures for the CHANGES Pilot

CARE Program - Table 10 - CHANGES One-On-One Customer Assistance Sessions

CARE Program - Table 11 - CHANGES Group Customer Assistance Sessions

**Energy Savings Assistance Program Table 1 - Expenses
SDG&E**

December 2020

| ESA Program: | Authorized Budget [1] [2] | | Current Month Expenses [4] | | | Year to Date Expenses | | | % of Budget Spent YTD | | |
|--|---------------------------|----------------------|----------------------------|-------------------|---------------------|-----------------------|---------------------|----------------------|-----------------------|------------|------------|
| | Electric | Gas | Electric | Gas | Total | Electric | Gas | Total | Electric | Gas | Total |
| Energy Efficiency | | | | | | | | | | | |
| Appliances | \$ 854,260 | \$ 319,825 | \$ 1,174,085 | \$ 4,390 | \$ 33,603 | \$ 195,301 | \$ 350,573 | \$ 545,874 | 23% | 110% | 46% |
| Domestic Hot Water | \$ 65,958 | \$ 2,132,630 | \$ 2,198,588 | \$ 3,922 | \$ 126,815 | \$ 27,872 | \$ 901,180 | \$ 929,052 | 42% | 42% | 42% |
| Enclosure | \$ 2,560,350 | \$ 3,393,952 | \$ 5,954,302 | \$ 84,733 | \$ 1,12,321 | \$ 569,604 | \$ 755,056 | \$ 1,324,660 | 22% | 22% | 22% |
| HVAC | \$ 427,358 | \$ 3,727,353 | \$ 4,154,711 | \$ 29,378 | \$ 161,561 | \$ 165,460 | \$ 1,479,959 | \$ 1,645,419 | 39% | 40% | 40% |
| Maintenance | \$ 7,063 | \$ 291,617 | \$ 298,680 | \$ - | \$ 11,641 | \$ 82,731 | \$ - | \$ 82,731 | 0% | 28% | 28% |
| Lighting | \$ 4,642,829 | \$ - | \$ 4,642,829 | \$ 223,572 | \$ - | \$ 1,917,130 | \$ - | \$ 1,917,130 | 41% | 0% | 41% |
| Miscellaneous | \$ 1,775,159 | \$ - | \$ 1,775,159 | \$ 57,548 | \$ - | \$ 401,685 | \$ - | \$ 401,685 | 23% | 0% | 23% |
| Customer Enrollment | \$ 2,195,740 | \$ 2,195,740 | \$ 4,391,481 | \$ 106,698 | \$ 213,397 | \$ 1,162,390 | \$ 1,162,390 | \$ 2,324,780 | 53% | 53% | 53% |
| In Home Education | \$ 348,433 | \$ 348,433 | \$ 696,865 | \$ 19,417 | \$ 38,834 | \$ 212,144 | \$ 212,144 | \$ 424,288 | 61% | 61% | 61% |
| Contractor Advanced Funds [3] | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 453,911 | \$ 453,911 | \$ 907,821 | 0% | 0% | 0% |
| Pilot | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | 0% | 0% | 0% |
| | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | 0% | 0% | 0% |
| | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | 0% | 0% | 0% |
| | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | 0% | 0% | 0% |
| Energy Efficiency TOTAL [4] | \$ 12,877,149 | \$ 12,409,550 | \$ 25,286,700 | \$ 554,483 | \$ 1,097,327 | \$ 5,105,495 | \$ 5,397,944 | \$ 10,503,440 | 40% | 43% | 42% |
| Training Center | \$ 249,089 | \$ 249,089 | \$ 498,179 | \$ 6,301 | \$ 12,601 | \$ 6,301 | \$ 6,301 | \$ 12,601 | 0% | 0% | 0% |
| Inspections | \$ 90,210 | \$ 90,210 | \$ 180,420 | \$ 10,064 | \$ 20,128 | \$ 79,913 | \$ 79,913 | \$ 159,826 | 89% | 89% | 89% |
| Marketing and Outreach [5] | \$ 600,000 | \$ 600,000 | \$ 1,200,000 | \$ 76,330 | \$ 152,660 | \$ 650,316 | \$ 650,316 | \$ 1,300,632 | 108% | 108% | 108% |
| Statewide Marketing Education and Outreach | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | 0% | 0% | 0% |
| Studies | \$ 17,083 | \$ 17,083 | \$ 34,166 | \$ - | \$ - | \$ - | \$ - | \$ - | 0% | 0% | 0% |
| Regulatory Compliance [6] | \$ 168,266 | \$ 168,266 | \$ 336,532 | \$ (51,605) | \$ (103,209) | \$ 174,944 | \$ 174,943 | \$ 349,887 | 104% | 104% | 104% |
| General Administration | \$ 1,368,601 | \$ 1,368,601 | \$ 2,737,202 | \$ 93,523 | \$ 187,046 | \$ 840,167 | \$ 840,166 | \$ 1,680,332 | 61% | 61% | 61% |
| CPUC Energy Division | \$ 23,877 | \$ 23,877 | \$ 47,754 | \$ 2,009 | \$ 4,018 | \$ 19,164 | \$ 19,164 | \$ 38,327 | 80% | 80% | 80% |
| Reallocation (MESO budget reduced from \$1.2M) | \$ 343,848 | \$ 343,848 | \$ 687,695 | \$ - | \$ - | \$ - | \$ - | \$ - | 0% | 0% | 0% |
| TOTAL PROGRAM COSTS | \$ 15,738,123 | \$ 15,270,824 | \$ 31,008,648 | \$ 691,105 | \$ 1,370,570 | \$ 6,876,299 | \$ 7,168,746 | \$ 14,045,044 | 44% | 47% | 45% |
| Indirect Costs | | | | | | | | | | | |
| NGAT Costs | \$ 288,000 | \$ 288,000 | \$ 288,000 | \$ 27,822 | \$ 50,214 | \$ 76,036 | \$ 485,725 | \$ 967,346 | 36% | 36% | 36% |
| | \$ - | \$ - | \$ - | \$ 15,886 | \$ 15,886 | \$ - | \$ 103,149 | \$ 103,149 | | | |

[1] Authorized budget does not include shifted funds from previous years and/or program cycles. Shifted funds, referred to as "2009-2016 Unspent ESA Program Funds", are reflected in ESA Table 1A.
 [2] Reflects the authorized funding approved in the CPUC Energy Division Disposition Letter dated 12/27/2018 approving SDG&E Advice Letter 3250-E/2686-G.
 [3] A total of \$907,821 for COVID-19 advanced payments was moved from "General Administration" to "Contractor Advanced Payments". Payment detail is as follows: CUJ \$32,000; Jerry's Heating & Air \$54,002; RHA \$205,120; Eagle Systems \$205,509; Amer Insulation/Amer Eco \$411,190. A total of \$261,220 was returned from the following contractors: \$86,720 THA; \$53,276 Jerry's Heating & Air; \$87,672 R&B Wholesale Distribution; \$33,550 Reliable Energy Mgmt.
 [4] Current Month Expenses for Energy Efficiency total includes December accruals and/or re-accruals of \$640,186.68 in the following reporting categories: Appliances \$0; Domestic Hot Water \$60,518.30; Enclosure \$73,886; HVAC \$73,798; Maintenance \$12,362; Lighting \$131,308.75; Miscellaneous \$38,102.66; Customer Enrollment \$211,757.33; In Home Education \$38,453.64.
 [5] Negative December amount due to reimbursements received from PGE and SCE for disaggregated load profile project in the month of December. Overage is due to increased labor.
 [6] Negative December amount due to reimbursements received from PGE and SCE for disaggregated load profile project in the month of December. Overage is due to increased labor.

NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Energy Savings Assistance Program Table 1A - Expenses Funded From 2009-2016 "Unspent ESA Program Funds"
SDG&E

December 2020

| ESA Program [1]: | Authorized Budget [2] | | Current Month Expenses | | Year to Date Expenses | | % of Budget Spent YTD | |
|--------------------------------------|-----------------------|---------------------|------------------------|------------------|-----------------------|-------------------|-----------------------|------------|
| | Electric | Gas | Electric | Gas | Electric | Gas | Electric | Gas |
| Energy Efficiency | | | | | | | | |
| Multi-Family Common Area Measures | \$ 1,767,500 | \$ 1,767,500 | \$ 197,724 | \$ 113,483 | \$ 1,168,759 | \$ 408,695 | 66% | 23% |
| In-Home Education | \$ 185,912 | \$ 185,912 | \$ - | \$ - | \$ - | \$ - | 0% | 0% |
| Leveraging - CSD [3] | \$ 241,216 | \$ 241,216 | \$ - | \$ - | \$ - | \$ - | 0% | 0% |
| Pilot [4] | \$ 25,000 | \$ 25,000 | \$ - | \$ - | \$ 18,283 | \$ 18,283 | 73% | 73% |
| Studies [5] [6] | \$ 30,625 | \$ 30,625 | \$ (14,949) | \$ (14,949) | \$ 26,207 | \$ 26,207 | 86% | 86% |
| Regulatory Compliance | | | | | | | | |
| General Administration | | | | | | | | |
| TOTAL PROGRAM BUDGET/EXPENSES | \$ 2,250,253 | \$ 2,250,253 | \$ 182,775 | \$ 98,533 | \$ 1,213,249 | \$ 453,185 | 54% | 20% |
| | | | | | | | | 37% |

[1] Add additional categories if relevant to your utility

[2] Reflects the authorized funding in D.16-11-022 and updated via Resolution E-4884 addressing conforming Advice Letters 3065-E/2568-G and 3065-E-A/2568-G-A. Budgets updated and approved via AL 3250-E/2688-G.

[3] Refers to budget supporting CSD's LIWP program

[4] Funding authorized for Programmable Communicating Thermostat (PCT) Pilot.

[5] Funding authorized for Rapid Feedback Research and Analysis and Potential and Goals Study.

[6] Negative December amount due to reimbursements received from PGE and SCE for disaggregated load profile project in the month of December. YTD total includes \$30.5K correction of 2019 expense incorrectly charged to General Administration (Table 1) and reclassified to Rapid Feedback Research and Analysis in PY2020.

NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

**Energy Savings Assistance Program Table 2A
SDG&E
December 2020**

| | Units | ESA Program - CSD Leveraging | | | | | % of Expenditure |
|--|-------|--|-----------------|----------------|--------------------|---------------|------------------|
| | | Year-To-Date Completed & Expensed Installation | | | | | |
| | | Quantity Installed | kWh[3] (Annual) | kW[3] (Annual) | Therms[3] (Annual) | Expenses (\$) | |
| Measures | | | | | | | |
| Appliances | | | | | | | |
| High Efficiency Clothes Washer | Each | - | - | - | - | \$ - | 0.0% |
| Refrigerators | Each | - | - | - | - | \$ - | 0.0% |
| Microwaves [4] | Each | - | - | - | - | \$ - | 0.0% |
| Domestic Hot Water | | | | | | | |
| Water Heater Blanket | Home | - | - | - | - | \$ - | 0.0% |
| Low Flow Shower Head | Home | - | - | - | - | \$ - | 0.0% |
| Water Heater Pipe Insulation | Home | - | - | - | - | \$ - | 0.0% |
| Faucet Aerator | Home | - | - | - | - | \$ - | 0.0% |
| Water Heater Repair/Replacement | Each | - | - | - | - | \$ - | 0.0% |
| Thermostatic Shower Valve | Each | - | - | - | - | \$ - | 0.0% |
| Combined Showerhead/TSV | Each | - | - | - | - | \$ - | 0.0% |
| Heat Pump Water Heater | Each | - | - | - | - | \$ - | 0.0% |
| Tub Diverter/ Tub Spout | Each | - | - | - | - | \$ - | 0.0% |
| Thermostat-controlled Shower Valve | Each | - | - | - | - | \$ - | 0.0% |
| Enclosure | | | | | | | |
| Air Sealing / Envelope [1] | Home | - | - | - | - | \$ - | 0.0% |
| Caulking | Home | - | - | - | - | \$ - | 0.0% |
| Attic Insulation | Home | - | - | - | - | \$ - | 0.0% |
| HVAC | | | | | | | |
| FAU Standing Pilot Conversion | Each | - | - | - | - | \$ - | 0.0% |
| Furnace Repair/Replacement | Each | - | - | - | - | \$ - | 0.0% |
| Room A/C Replacement | Each | - | - | - | - | \$ - | 0.0% |
| Central A/C replacement | Each | - | - | - | - | \$ - | 0.0% |
| Heat Pump Replacement | Each | - | - | - | - | \$ - | 0.0% |
| Evaporative Cooler (Replacement) | Each | - | - | - | - | \$ - | 0.0% |
| Evaporative Cooler (Installation) | Each | - | - | - | - | \$ - | 0.0% |
| Duct Testing and Sealing | Home | - | - | - | - | \$ - | 0.0% |
| Energy Efficient Fan Control | Home | - | - | - | - | \$ - | 0.0% |
| Prescriptive Duct Sealing | Home | - | - | - | - | \$ - | 0.0% |
| High Efficiency Forced Air Unit (HE FAU) | Home | - | - | - | - | \$ - | 0.0% |
| A/C Time Delay | Home | - | - | - | - | \$ - | 0.0% |
| Maintenance | | | | | | | |
| Furnace Clean and Tune | Home | - | - | - | - | \$ - | 0.0% |
| Central A/C Tune up | Home | - | - | - | - | \$ - | 0.0% |
| Lighting | | | | | | | |
| Interior Hard wired LED fixtures | Each | | | | | | |
| Exterior Hard wired LED fixtures | Each | | | | | | |
| Torchiere LED | Each | - | - | - | - | \$ - | 0.0% |
| Occupancy Sensor | Each | - | - | - | - | \$ - | 0.0% |
| LED Night Lights | Each | - | - | - | - | \$ - | 0.0% |
| LED Diffuse Bulb (60W Replacement) | Each | - | - | - | - | \$ - | 0.0% |
| LED Reflector Bulb | Each | - | - | - | - | \$ - | 0.0% |
| LED Reflector Downlight Retrofit Kits | Each | - | - | - | - | \$ - | 0.0% |
| LED A-Lamps | Each | - | - | - | - | \$ - | 0.0% |
| Miscellaneous | | | | | | | |
| Pool Pumps | Each | - | - | - | - | \$ - | 0.0% |
| Smart Power Strips - Tier 1 | Each | - | - | - | - | \$ - | 0.0% |
| Smart Power Strips - Tier 2 | Each | - | - | - | - | \$ - | 0.0% |
| Pilots | | | | | | | |
| Customer Enrollment | | | | | | | |
| Outreach & Assessment | Home | - | - | - | - | \$ - | 0.0% |
| In-Home Education | Home | - | - | - | - | \$ - | 0.0% |
| Total Savings/Expenditures | | | | | | | |
| | | | | | | | |
| Total Households Weatherized [2] | | | | | | | |
| CSD MF Tenant Units Treated | | | Total | | | | |
| | | | - | | | | |

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.

[3] All savings are calculated based on the following sources:

[4] Microwave savings are from ECONorthWest Study received in December of 2011.

Energy Savings Assistance Common Area Measures Program Table 2B
SDG&E
December 2020

| Table 2B ESA Program - Multifamily Common Area Measures ⁵ | | | | | | | |
|--|---------------------------------|--------------------|---|--|-------------|----------------|---------------|
| ESA CAM Measures ^[1] Appliances | Units of Measure such as "each" | Quantity Installed | Number of Units for Cap-KBTU/h and Cap-Tons | Year-To-Date Completed & Expensed Installation | | | |
| | | | | kWh (Annual) | KW (Annual) | Thems (Annual) | Expenses (\$) |
| Domestic Hot Water | | | | | | | |
| Central Boiler** | Cap-KBTU/h | 1500 | 6 | | | | 4659 \$ |
| Faucet Aerator | Each | 23 | 531 | | | | 75 \$ |
| Pipe Insulation | Home | 3 | | | | | 26 \$ |
| Envelope | | | | | | | |
| | | | | | | | |
| HVAC | | | | | | | |
| AC Tune-up** | Cap-Tons | 144 | 47 | 2,595 | 3 | 27 \$ | 17,774 |
| Furnace Replacement** | Cap-KBTU/h | 148 | 3 | | | 45 \$ | 4,955 |
| HEAT Pump Split System** | Cap-Tons | 20 | | 808 | 1 | (0) \$ | 48,010 |
| HEAT Pump Split System | Each | 5 | | 77 | 0 | (0) \$ | 10,454 |
| Programmable Thermostat | Each | 4 | | 335 | | 19 \$ | 1,160 |
| Lighting | | | | | | | |
| Exterior LED Lighting | Fixture | 1,905 | | 124,549 | | | 351,221 |
| Exterior LED Lighting - Pool | Lamp | 2 | | 3,790 | | | 2,371 |
| Interior LED Exit Sign | Fixture | 6 | | 58 | 0 | (0) \$ | 783 |
| Interior LED Fixture | Fixture | 2,006 | | 371,181 | 87 | (1,058) \$ | 231,851 |
| Interior LED Lighting** | KiloLumen | 905 | | 21,091 | 5 | (188) \$ | 95,900 |
| Interior LED Screw-in | Lamp | 943 | | 5,234 | 1 | (20) \$ | 9,590 |
| Interior TLED Type A Lamps | Lamp | 3,222 | | 121,128 | 29 | (1,114) \$ | 41,253 |
| Interior TLED Type C Lamps | Lamp | 1,336 | | 50,226 | 12 | (480) \$ | 36,389 |
| Miscellaneous | | | | | | | |
| Tier-2 Smart Power Strip | Each | 31 | | 4,201 | 1 | (53) \$ | 2,989 |
| Variable Speed Pool Pump | Each | 3 | | 7,254 | 1 | | 3,948 |
| Ancillary Services | | | | | | | |
| Audit* | | 51 | | | | | 82,311 |
| | | | | | | | |
| Total | | | | 713,057 | 140 | 1,936 \$ | 1,016,159 |

| Multifamily Properties Treated | Number |
|---|--------|
| Total Number of Multifamily Properties Treated ² | 64 |
| Subtotal of Master-metered Multifamily Properties Treated | 19 |
| Total Number of Multifamily Tenant Units w/in Properties Treated ³ | 4651 |

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs
 [2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.
 [3] All savings are calculated based on the following sources:
 [4] Per D.16-11-022 at p.210, the CPUC imposes a cap of 10% of ESA Program funds for administrative activities and a ceiling of 20% for direct implementation non-incentive costs.
 [5] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.
 * Note: Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022 where 65% of tenants are income eligible based on CPUC income
 Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.
 ** Note: This represents the unit of measure such as Cap Tons and Cap KBTU/h. It is not a count of each measure installed or each home the measure was installed in.

Energy Savings Assistance CAM Program Table 2B-1, Eligible Common Area Measures List
SDG&E
December 2020

| Common Area Measures Category and Eligible Measures Title [1] | Effective Date | End Date[2] | Eligible Climate Zones [3] |
|---|----------------|-------------|----------------------------|
| Appliances | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Domestic Hot Water | | | |
| Pipe Insulation | 18-May | | 6, 7, 8, 10, 14, 15 |
| Faucet Aerator | 18-May | | 6, 7, 8, 10, 14, 15 |
| Central Boiler | 18-May | | 6, 7, 8, 10, 14, 16 |
| | | | |
| | | | |
| | | | |
| | | | |
| Envelope | | | |
| | | | |
| | | | |
| | | | |
| HVAC | | | |
| AC Tune-up | 18-May | | 6, 7, 8, 10, 14, 15 |
| Furnace Replacement | 18-May | | 6, 7, 8, 10, 14, 15 |
| HEAT Pump Split System | 18-May | | 6, 7, 8, 10, 14, 15 |
| HEAT Pump Split System | 18-May | | 6, 7, 8, 10, 14, 15 |
| Programmable Thermostat | 18-May | | 6, 7, 8, 10, 14, 15 |
| | | | |
| | | | |
| | | | |
| Lighting | | | |
| Exterior LED Lighting | 18-May | | 6, 7, 8, 10, 14, 15 |
| Interior LED Lighting | 18-May | | 6, 7, 8, 10, 14, 15 |
| Interior TLED Type A Lamps | 18-May | | 6, 7, 8, 10, 14, 15 |
| Interior TLED Type C Lamps | 18-May | | 6, 7, 8, 10, 14, 15 |
| Interior LED Exit Sign | 18-May | | 6, 7, 8, 10, 14, 15 |
| Interior LED Fixture | 18-May | | 6, 7, 8, 10, 14, 15 |
| Interior LED Screw-in | 18-May | | 6, 7, 8, 10, 14, 15 |
| Exterior LED Lighting - Pool | 18-May | | 6, 7, 8, 10, 14, 15 |
| | | | |
| | | | |
| Miscellaneous | | | |
| Tier-2 Smart Power Strip | 18-May | | 6, 7, 8, 10, 14, 15 |
| Variable Speed Pool Pump | 18-May | | 6, 7, 8, 10, 14, 15 |
| | | | |

Standard Notes (do not delete)

1. Measures list may change based on available information on both costs and benefits (including energy benefits as well as non-energy benefits) and may vary across climate zones. This is not a list of installed measures, it is a list of eligible measures.

Table 2B-1 Column A should match Table 2B Column A for eligible (not canceled) measures.

2. Only complete if measure is canceled or discontinued

3. Defined as CEC California Building Climate Zones

https://www.energy.ca.gov/maps/renewable/building_climate_zones.html

**Energy Savings Assistance Program Tables 3A-B - Energy Savings and
Average Bill Savings per Treated Home/Common Area
SDG&E
December 2020**

| Table 3A-1, ESA Program | |
|--|-----------|
| Annual kWh Savings | 1,056,869 |
| Annual Therm Savings | 32,954 |
| Lifecycle kWh Savings | 9,429,054 |
| Lifecycle Therm Savings | 183,979 |
| Current kWh Rate | \$ 0.18 |
| Current Therm Rate | \$ 1.08 |
| Average 1st Year Bill Savings / Treated households | \$ 22.91 |
| Average Lifecycle Bill Savings / Treated Household | \$ 192.33 |

| Table 3A-2, ESA Program - CSD Leveraging | |
|--|------|
| Annual kWh Savings | - |
| Annual Therm Savings | - |
| Lifecycle kWh Savings | - |
| Lifecycle Therm Savings | - |
| Current kWh Rate | \$ - |
| Current Therm Rate | \$ - |
| Average 1st Year Bill Savings / Treated Households | \$ - |
| Average Lifecycle Bill Savings / Treated Household | \$ - |

| Table 3A-3, Summary - ESA Program/CSD Leveraging | |
|---|-----------|
| Annual kWh Savings | 1,056,869 |
| Annual Therm Savings | 32,954 |
| Lifecycle kWh Savings | 9,429,054 |
| Lifecycle Therm Savings | 183,979 |
| Current kWh Rate | \$ 0.18 |
| Current Therm Rate | \$ 1.08 |
| Average 1st Year Bill Savings / Treated Households | \$ 22.91 |
| Average Lifecycle Bill Savings / Treated Households | \$ 192.33 |

[1] Summary is the sum of ESA Program + CSD Leveraging

| Table 3B, ESA Program - Multifamily Common Area | |
|--|--------------|
| Annual kWh Savings | 713,057 |
| Annual Therm Savings | 1,936 |
| Lifecycle kWh Savings | 7,176,616 |
| Lifecycle Therm Savings | 60,774 |
| Current kWh Rate | \$0.18 |
| Current Therm Rate | \$1.08 |
| Average 1st Year Bill Savings / Treated Property | \$ 2,339.59 |
| Average Lifecycle Bill Savings / Treated Property | \$ 24,345.93 |

Energy Savings Assistance Program Table 4 - Homes/Buildings Treated
SDG&E
December 2020

| Table 4A-1, ESA Program | | | | | | |
|-------------------------|---------------------|----------------|----------------|------------------------|--------------|--------------|
| County | Eligible Households | | | Households Treated YTD | | |
| | Rural [1] | Urban | Total | Rural | Urban | Total |
| Orange | 0 | 14,986 | 14,986 | 0 | 473 | 473 |
| San Diego | 6,141 | 282,825 | 288,966 | 276 | 8,554 | 8,830 |
| Total | 6,141 | 297,811 | 303,952 | 276 | 9,027 | 9,303 |

| Table 4B, ESA Program - CSD Leveraging | | | | |
|--|------------------------|-------|-------|-------|
| County | Households Treated YTD | | | Total |
| | Rural | Urban | Total | |
| Orange | | | | 0 |
| San Diego | | | 0 | 0 |
| Total | | 0 | 0 | 0 |

| Table 4C, ESA Program - Multifamily Common Area | | | | |
|---|------------------------|-------|-----------|-----------|
| County | Properties Treated YTD | | | Total |
| | Rural | Urban | Total | |
| Orange | - | - | - | - |
| San Diego | - | - | 64 | 64 |
| Total | | | 64 | 64 |

[1] For IOU low income-related and Energy Efficiency reporting and analysis, the Goldsmith definition is applied.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

*Do not currently have Eligible Properties for ESA CAM.

Energy Savings Assistance Program Table 4A-2, Homes Unwilling / Unable to Participate
SDG&E
December 2020

| ESA Program | Reason Provided | | | | | | | Other Infeasible/ Ineligible |
|--------------|--|---|--|---|------------------------------------|--|--------------|------------------------------|
| | Customer Unwilling/Declined Program Measures | Customer Unavailable - Scheduling Conflicts | Hazardous Environment (unsafe/unclean) | Landlord Refused to Authorize Participation | Household Exceeds Allowable Limits | Unable to Provide Required Documentation | | |
| Orange | 185 | 301 | 0 | 0 | 326 | 1 | 55 | |
| San Diego | 6,986 | 14,776 | 52 | 0 | 8,566 | 581 | 985 | |
| Total | 7,171 | 15,077 | 52 | 0 | 8,892 | 582 | 1,040 | |

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Energy Savings Assistance Program Table 5 - Energy Savings Assistance Program Customer Summary
SDG&E
December 2020

| Table 5A, ESA Program | | | | | | | | | | | | | | |
|-----------------------|---------------------------------|---------------|----------------|---------------------------------|----------|----------------|---------------------------------|----------|--------------|------------------|-------------------|---------------|------------------|------------|
| Month | Gas & Electric | | | Gas Only | | | Electric Only | | | Total | | | | |
| | # of Household Treated by Month | (Annual) | | # of Household Treated by Month | (Annual) | | # of Household Treated by Month | (Annual) | | # of First-Touch | # of Re-treatment | | | |
| | | Therm | kWh | | Therm | kWh | | Therm | kWh | | | | | |
| January | 32 | 12,547 | 2 | - | - | 397 | 0 | - | 32 | 19 | 13 | 393 | 12,944 | 2 |
| February | 299 | 68,573 | 9 | - | - | 13,798 | 2 | - | 369 | 203 | 166 | 2,639 | 82,371 | 11 |
| March | 783 | 123,770 | 16 | - | - | 47,714 | 7 | - | 1,054 | 770 | 284 | 3,423 | 171,485 | 23 |
| April | 2,702 | 182,846 | 22 | - | - | 9,385 | 1 | - | 2,861 | 865 | 1,996 | 209 | 172,231 | 23 |
| May | 138 | 15,233 | 2 | - | - | 2,077 | 85 | - | 144 | 85 | 59 | 522 | 17,310 | 2 |
| June | 125 | 12,189 | 2 | - | - | 1,093 | 0 | - | 128 | 49 | 79 | 2,007 | 13,282 | 2 |
| July | 302 | 47,751 | 6 | - | - | 2,900 | 0 | - | 313 | 170 | 143 | 4,751 | 48,775 | 6 |
| August | 917 | 67,648 | 9 | - | - | 6,255 | 1 | - | 953 | 435 | 518 | 4,035 | 73,903 | 10 |
| September | 627 | 804 | 74,999 | 10 | - | 7,444 | 1 | - | 653 | 347 | 306 | 804 | 82,443 | 11 |
| October | 611 | 2,329 | 86,064 | 12 | - | 9,245 | 1 | - | 637 | 305 | 332 | 2,329 | 95,309 | 13 |
| November | 1,037 | 10,052 | 155,024 | 20 | - | 12,154 | 1,618 | - | 1,098 | 564 | 564 | 10,052 | 167,178 | 22 |
| December | 834 | 1,791 | 86,920 | 12 | - | 32,719 | 4,539 | - | 1,061 | 480 | 581 | 1,791 | 119,638 | 17 |
| YTD | 8,407 | 32,954 | 911,688 | 122 | - | 145,181 | 20 | - | 9,303 | 4,262 | 5,041 | 32,954 | 1,056,869 | 142 |

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.
Note: SDG&E tracks the measure savings based on the month and year of install. Households treated can have a value of zero, meaning the treated date is from a previous year but the measure install and savings were tracked in a new Program Year.

| Table 5B, ESA Program - CSD Leveraging | | | | | | | | | | | | | | |
|--|---------------------------------|----------|----------|---------------------------------|----------|----------|---------------------------------|----------|----------|----------------------------------|-------------------|----------|----------|----------|
| Month | Gas & Electric | | | Gas Only | | | Electric Only | | | Total | | | | |
| | # of Household Treated by Month | (Annual) | | # of Household Treated by Month | (Annual) | | # of Household Treated by Month | (Annual) | | # of Properties Treated by Month | # of Re-treatment | | | |
| | | Therm | kWh | | Therm | kWh | | Therm | kWh | | | | | |
| January | | | | | | | | | | | | | | |
| February | | | | | | | | | | | | | | |
| March | | | | | | | | | | | | | | |
| April | | | | | | | | | | | | | | |
| May | | | | | | | | | | | | | | |
| June | | | | | | | | | | | | | | |
| July | | | | | | | | | | | | | | |
| August | | | | | | | | | | | | | | |
| September | | | | | | | | | | | | | | |
| October | | | | | | | | | | | | | | |
| November | | | | | | | | | | | | | | |
| December | | | | | | | | | | | | | | |
| YTD | - | - | - | - | - | - | - | - | - | - | - | - | - | 0 |

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2A.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

| Table 5C, ESA Program - Multifamily Common Area | | | | | | | | | | | | | |
|---|----------------------------------|--------------|----------------|----------------------------------|----------|-----|----------------------------------|----------|-----|----------------------------------|-------------------|----------------|------------|
| Month | Gas & Electric | | | Gas Only | | | Electric Only | | | Total | | | |
| | # of Properties Treated by Month | (Annual) | | # of Properties Treated by Month | (Annual) | | # of Properties Treated by Month | (Annual) | | # of Properties Treated by Month | # of Re-treatment | | |
| | | Therm | kWh | | Therm | kWh | | Therm | kWh | | | | |
| January | 4 | (174.31) | 64,262.63 | 12.30 | - | - | 6802 | 2 | - | 5 | -174 | 71,065 | 14 |
| February | 5 | (615.46) | 144,491.00 | 30.84 | - | - | 16209 | 3 | - | 6 | -615 | 160,700 | 33 |
| March | 8 | (258.96) | 64,527.36 | 11.14 | - | - | - | - | - | 8 | -259 | 64,527 | 11 |
| April | | | | | | | | | | | | | |
| May | | | | | | | | | | | | | |
| June | 3 | (374.42) | 63,636.91 | 14.70 | - | - | - | - | - | 3 | -374 | 63,637 | 15 |
| July | 10 | 1,239 | 68,764 | 16 | - | - | - | - | - | 10 | 1239 | 68,764 | 16 |
| August | 7 | (213) | 66,301 | 12 | - | - | - | - | - | 7 | -213 | 66,301 | 12 |
| September | 1 | 828 | 1,531 | 0 | - | - | - | - | - | 1 | 828 | 1,531 | 0 |
| October | 3 | 1,207 | 5,607 | 2 | - | - | - | - | - | 3 | 1,207 | 5,607 | 2 |
| November | 9 | (387) | 93,310 | 19 | - | - | - | - | - | 11 | (387) | 104,744 | 21 |
| December | 8 | 685 | 96,551 | 15 | - | - | - | - | - | 10 | 685 | 106,181 | 16 |
| YTD | 58 | 1,936 | 668,981 | 132 | - | - | 44,076 | 7 | - | 64 | 1,936 | 713,057 | 140 |

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2B.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Energy Savings Assistance Program Table 6 - Expenditures for Pilots and Studies
SDG&E

December 2020

| | Authorized 2019 Funding [1] | | | Current Month Expenses | | | Year to Date Expenses | | | % of Budget Expensed | | |
|--|-----------------------------|------------------|------------------|------------------------|--------------------|--------------------|-----------------------|------------------|------------------|----------------------|------------|------------|
| | Electric | Gas | Total | Electric | Gas | Total | Electric | Gas | Total | Electric | Gas | Total |
| Pilots | | | | | | | | | | | | |
| Programmable Communicating Thermostat (PCT) [2] | \$ 25,000 | \$ 25,000 | \$ 50,000 | \$ - | \$ - | \$ - | \$ 18,283 | \$ 18,283 | \$ 36,565 | 73% | 73% | 73% |
| Total Pilots | \$ 25,000 | \$ 25,000 | \$ 50,000 | | | \$ - | | | \$ 36,565 | 0% | 0% | 73% |
| Studies | | | | | | | | | | | | |
| Low Income Needs Assessment Study | \$ 8,334 | \$ 8,334 | \$ 16,667 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | 0% | 0% | 0% |
| Load Impact Evaluation Study | \$ 9,167 | \$ 9,167 | \$ 18,333 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | 0% | 0% | 0% |
| Equity Criteria and Non Energy Benefits Evaluation (NEB's) | \$ 2,500 | \$ 2,500 | \$ 5,000 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | 0% | 0% | 0% |
| Unallocated Funds [3] | \$ (2,917) | \$ (2,917) | \$ (5,834) | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | 0% | 0% | 0% |
| 2017 Potential and Goals Study | \$ 5,625 | \$ 5,625 | \$ 11,250 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | 0% | 0% | 0% |
| Rapid Feedback Research and Analysis [4] | \$ 25,000 | \$ 25,000 | \$ 50,000 | \$ (14,949) | \$ (14,949) | \$ (29,898) | \$ 26,207 | \$ 26,207 | \$ 52,414 | 105% | 105% | 105% |
| Total Studies | \$ 47,708 | \$ 47,708 | \$ 95,416 | \$ (14,949) | \$ (14,949) | \$ (29,898) | \$ 26,207 | \$ 26,207 | \$ 52,414 | 55% | 55% | 55% |

[1] Reflects the authorized funding in D.16-11-022 and updated via Resolution E-4884 addressing conforming Advice Letters 3065-E/2568-G and 3065-E-A/2568-G-A.

[2] Programmable Communicating Thermostat (PCT) Pilot budget approved via al 3250-E/2688-G. [Table 1A].

[3] Unallocated funds represent the amount of funds originally requested for the Energy Education Phase II Study which was subsequently not authorized in D.16-11-022. However the budget was authorized and is not unallocated to a specific study [Table 1].

[4] Negative Dec amount due to reimbursements received from PGE and SCE for disaggregated load profile project. YTD total includes \$30.5K correction of 2019 expense incorrectly charged to General Administration (Table 1) and reclassified to Rapid Feedback Research and Analysis in PY2020.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Energy Savings Assistance Program Table 7 (Second Refrigerators, In-Home Education, MyEnergy/My Account Platform)

**SDG&E
December 2020**

| 7A - Households Receiving Second Refrigerators - YTD | | | |
|---|--------------|------------------------------|---|
| Measures | Units | Received Refrigerator | Not eligible for Refrigerator due to Less than Six Occupants |
| Second Refrigerators | Each | 1 | 0 |

| 7B - Households Receiving In- Home Energy Education Only | |
|---|---|
| Measures | Households that Only Received Energy Education |
| In-Home Education | Home |
| | 597 |

| 7C - Households for My Energy/My Account Platform - YTD | | |
|--|-------------------------|---------------|
| Opt-Out | Already Enrolled | Opt-In |
| 9,044 | 2,358 | 448 |

**Energy Savings Assistance Program Table 8 - Contractor Advanced Funding and Repayment
SDG&E
December 2020**

| | | B-C | | | E x F | | | (B)-(cumulative H + cumulative I) |
|--------------|--|--|--|--|--|--|--|--|
| | Total Advance Eligible for PPRS Credit [1] | Total Advance Not Eligible for PPRS Credit | Percentage for PPRS Credit Calculation [2] | Total Contractor Invoices each month[3] | Total PPRS Credit Earned each month[4] | PPRS Credits Applied each month [5] | Non PPRS Payments Applied each month[6] | Total Advances Outstanding |
| Jan-20 | | | | | | | | \$ - |
| Feb-20 | | | | | | | | \$ - |
| Mar-20 | | | | | | | | \$ - |
| Apr-20 | \$ 552,731 | | | \$ - | \$ - | \$ - | \$ - | \$ 552,731 |
| May-20 | \$ 411,190 | | | \$ - | \$ - | \$ - | \$ (87,672) | \$ 876,249 |
| Jun-20 | \$ 205,120 | | | \$ - | \$ - | \$ - | \$ (53,278) | \$ 1,028,091 |
| Jul-20 | \$ - | | | \$ - | \$ - | \$ - | \$ (33,550) | \$ 994,541 |
| Aug-20 | \$ - | | | \$ - | \$ - | \$ - | \$ (86,720) | \$ 907,821 |
| Sep-20 | \$ - | | | \$ - | \$ - | \$ - | \$ - | \$ 907,821 |
| Oct-20 | \$ - | | | \$ - | \$ - | \$ - | \$ - | \$ - |
| Nov-20 | \$ - | | | \$ - | \$ - | \$ - | \$ - | \$ - |
| Dec-20 | \$ - | | | \$ - | \$ 46,703 | \$ - | \$ - | \$ - |
| Total | \$ 1,169,041 | | 40% | \$ - | \$ 46,703 | \$ - | \$ (261,220) | \$ 907,821 |

IOUs - Do not delete footnotes 1-6 below.

[1] Contractor labor and labor-related costs. Post-Pandemic Return to Service (PPRS) credit eligible.

[2] 40% for PPRS credit calculation from Joint Tier 2 Advice Letter 5654-G filed on June 29, 2020.

[3] For work performed during PPRS credit-earning period for contractors receiving advances. SDG&E PPRS earning period will begin December 1, 2020.

[4] Based on total monthly contractor invoices, up to maximum allowable for each contractor.

[5] Credits may be applied at a later date than earned depending on the contractor repayment schedule. This value should not exceed column G.

[6] Includes repayments processed for which PPRS credits were not applied, including contractor payments returned unused due to agreement termination or duplicate payments received from other funding sources.

[7] Advance funding provided to contractors in month occurred.

Note: This table created pursuant to section 1.2.3 in Commission Resolution E-5074. This report covers the period from the issuance of advances until the last day of the month reported. Any required corrections/adjustments are reported herein and supersede results reported in prior months.

**CARE Table 1 - CARE Program Expenses
SDG&E**

December 2020

| CARE Program: | Authorized Budget [1] [2] | | | Current Month Expenses | | | Year to Date Expenses | | | % of Budget Spent YTD | | |
|---|---------------------------|----------------------|-----------------------|------------------------|---------------------|----------------------|-----------------------|----------------------|-----------------------|-----------------------|-------------|-------------|
| | Electric | Gas | Total | Electric | Gas | Total | Electric | Gas | Total | Electric | Gas | Total |
| Outreach | \$ 2,928,754 | \$ 325,417 | \$ 3,254,171 | \$ 236,247 | \$ 29,199 | \$ 265,446 | \$ 2,291,092 | \$ 294,312 | \$ 2,585,404 | 78% | 90% | 79% |
| Processing / Certification Re-certification [3] | \$ 465,490 | \$ 51,721 | \$ 517,211 | \$ 30,095 | \$ 3,720 | \$ 33,815 | \$ 518,075 | \$ 65,341 | \$ 583,416 | 111% | 126% | 113% |
| Post Enrollment Verification | \$ 327,300 | \$ 36,367 | \$ 363,667 | \$ 6,038 | \$ 746 | \$ 6,784 | \$ 125,490 | \$ 15,874 | \$ 141,364 | 38% | 44% | 39% |
| IT Programming | \$ 1,547,910 | \$ 171,990 | \$ 1,719,900 | \$ 65,866 | \$ 8,141 | \$ 74,007 | \$ 654,697 | \$ 83,846 | \$ 738,543 | 42% | 49% | 43% |
| Cooling Centers [2] | | | | | | | \$ (37,002) | \$ (5,046) | \$ (42,048) | 0% | 0% | 0% |
| Pilots/CHANGES Program [4] | \$ 240,960 | \$ 26,773 | \$ 267,733 | \$ (3,324) | \$ (411) | \$ (3,735) | \$ 202,380 | \$ 25,872 | \$ 228,253 | 84% | 97% | 85% |
| Studies [5] | | | | | | | | | | 0% | 0% | 0% |
| Regulatory Compliance [6] | \$ 273,288 | \$ 30,365 | \$ 303,653 | \$ (38,953) | \$ (4,814) | \$ (43,767) | \$ 390,146 | \$ 47,230 | \$ 437,376 | 143% | 156% | 144% |
| General Administration | \$ 752,622 | \$ 83,625 | \$ 836,246 | \$ 133,926 | \$ 16,553 | \$ 150,479 | \$ 601,074 | \$ 75,481 | \$ 676,556 | 80% | 90% | 81% |
| CPUC Energy Division [7] | \$ 52,067 | \$ 5,785 | \$ 57,852 | \$ 8,344 | \$ 1,031 | \$ 9,375 | \$ 79,411 | \$ 10,020 | \$ 89,431 | 153% | 173% | 155% |
| SUBTOTAL MANAGEMENT COSTS | \$ 6,588,390 | \$ 732,043 | \$ 7,320,433 | \$ 438,240 | \$ 54,165 | \$ 492,405 | \$ 4,825,364 | \$ 612,931 | \$ 5,438,295 | 73% | 84% | 74% |
| CARE Rate Discount [8] | \$ 107,779,365 | \$ 14,644,166 | \$ 122,423,531 | \$ 10,348,769 | \$ 2,078,517 | \$ 12,427,286 | \$ 123,202,068 | \$ 16,412,232 | \$ 139,614,300 | 114% | 112% | 114% |
| TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS | \$ 114,367,755 | \$ 15,376,209 | \$ 129,743,964 | \$ 10,787,009 | \$ 2,132,681 | \$ 12,919,690 | \$ 128,027,432 | \$ 17,025,163 | \$ 145,052,595 | 112% | 111% | 112% |
| Other CARE Rate Benefits | | | | | | | | | | | | |
| - DWR Bond Charge Exemption | | | | \$ 731,606 | | \$ 731,606 | \$ 88,585,953 | | \$ 8,585,953 | | | |
| - CARE Surcharge Exemption | | | | \$ 895,553 | \$ 160,315 | \$ 1,055,868 | \$ 10,509,992 | \$ 1,345,708 | \$ 11,855,700 | | | |
| - California Solar Initiative Exemption | | | | \$ 0 | | \$ 0 | \$ 0 | | \$ 0 | | | |
| - kWh Surcharge Exemption | | | | \$ 36,591 | | \$ 36,591 | \$ 963,929 | | \$ 963,929 | | | |
| - Vehicle Grid Integration Exemption | | | | \$ 83,845 | | \$ 83,845 | \$ 956,795 | | \$ 956,795 | | | |
| Total Other CARE Rate Benefits | | | | \$ 1,747,595 | \$ 160,315 | \$ 1,907,910 | \$ 21,016,669 | \$ 1,345,708 | \$ 22,362,377 | | | |
| Indirect Costs | | | | \$ 56,956 | \$ 7,040 | \$ 63,996 | \$ 774,294 | \$ 97,824 | \$ 872,118 | | | |

[1] Reflects the authorized funding approved in the CPUC Energy Division Disposition Letter dated 12/27/2018 approving SDG&E Advice Letter 3250-E/2688-G.
 [2] Removed budget of \$43,935 and reclassified expenses of \$42,048 related to PY2019 as Cool Centers expense activity is now captured under O&M, effective January 1, 2019.
 [3] Coverage due additional training hours for Envision and unbudgeted transfers from Customer Call Center.
 [4] Negative December amount due to over-estimated accruals from November 2020. Decision 15-12-047 transitioned CHANGES pilot to CHANGES program and funding for the effort is captured herein.
 [5] Reflects the Annual Eligibility Estimates prepared by Athens Research on behalf of the utilities. This effort was formerly referenced as Measurement and Evaluation.
 [6] Negative December amount due to reimbursements received from PGE and SCE for the disaggregated load profile project in the month of December. Coverage due to increase labor.
 [7] Includes increased expenses for Energy Division Staff.
 [8] Updated CARE Discount from \$74,571,504 to \$122,423,531 as authorized in AL 3440-E and AL 2815-G, effective January 1, 2020.

NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration⁵
SDG&E
December 2020

| | New Enrollment | | | | | | | | | | Recertification | | | | | Attrition (Drop Offs) | | | | Enrollment | | Total CARE Participants | Estimated CARE Eligible ⁵ | Penetration Rate % (W/X) |
|------------------|--|----------------------------|-----------------------------------|------------------|--------------------|----------------------------|--------------|----------------------------|---------------|-------------------------------|--------------------------|---------------------------|-------------------------------------|---------------|---------------------------|-----------------------|--------------------|---------------|---------------|----------------|---------------|-------------------------|--------------------------------------|--------------------------|
| | Self-Certification (Income or Categorical) | | | | | Total New Enrollment (E+J) | Scheduled | Non-Scheduled (Duplicates) | Automatic | Total Recertification (L+M+N) | No Response ⁴ | Failed ^{5,7} PEV | Failed Recertification ⁵ | Other | Total Attrition (P+Q+R+S) | Gross (K+O) | Net Adjusted (K-T) | | | | | | | |
| | Inter-Utility ¹ | Intra-Utility ² | Automatic Leveraging ³ | Combined (B+C+D) | Combined (F+G+H+I) | | | | | | | | | | | | | Online | Paper | Phone | Capitation | | | |
| January | 70 | 172 | 0 | 242 | 4,366 | 1,307 | 343 | 246 | 6,262 | 6,504 | 3,911 | 3,619 | 4,130 | 11,660 | 1,443 | 66 | 171 | 5,604 | 7,284 | 18,164 | -760 | 300,720 | 302,245 | 99% |
| February | 0 | 146 | 0 | 146 | 4,476 | 978 | 245 | 244 | 5,943 | 6,089 | 1,917 | 2,860 | 4,160 | 8,937 | 1,671 | 77 | 153 | 1,699 | 3,600 | 15,026 | 2,489 | 303,209 | 302,245 | 100% |
| March | 0 | 79 | 0 | 79 | 7,039 | 1,301 | 630 | 238 | 9,208 | 9,287 | 2,067 | 2,409 | 2,298 | 6,774 | 64 | 9 | 42 | 3,016 | 3,131 | 16,061 | 6,156 | 309,365 | 302,245 | 102% |
| April | 0 | 36 | 0 | 36 | 6,925 | 1,137 | 712 | 216 | 8,990 | 9,026 | 220 | 665 | 0 | 885 | 398 | 8 | 9 | 2,352 | 2,767 | 9,911 | 6,259 | 315,624 | 302,245 | 104% |
| May | 17 | 6 | 0 | 23 | 6,992 | 1,288 | 1,085 | 213 | 8,978 | 9,001 | 13 | 583 | 0 | 596 | 0 | 0 | 0 | 2,244 | 2,244 | 9,597 | 6,767 | 322,381 | 302,245 | 107% |
| June | 152 | 22 | 0 | 174 | 5,277 | 717 | 494 | 165 | 6,653 | 6,827 | 10 | 434 | 1 | 445 | 0 | 0 | 1 | 2,977 | 2,978 | 7,272 | 3,849 | 326,230 | 302,245 | 108% |
| July | 48 | 32 | 0 | 80 | 4,671 | 799 | 444 | 176 | 6,230 | 6,310 | 42 | 482 | 0 | 524 | 0 | 1 | 0 | 3,328 | 3,329 | 6,634 | 2,961 | 329,211 | 302,245 | 109% |
| August | 38 | 36 | 0 | 72 | 4,268 | 512 | 512 | 130 | 5,422 | 5,494 | 38 | 520 | 0 | 558 | 0 | 0 | 0 | 3,307 | 3,307 | 6,052 | 2,187 | 331,398 | 302,245 | 110% |
| September | 24 | 103 | 0 | 127 | 3,447 | 365 | 220 | 148 | 4,180 | 4,307 | 71 | 531 | 0 | 602 | 0 | 0 | 0 | 3,451 | 2,971 | 4,909 | 1,336 | 334,452 | 302,245 | 111% |
| October | 32 | 99 | 0 | 131 | 3,752 | 405 | 294 | 123 | 4,574 | 4,705 | 2 | 503 | 0 | 505 | 0 | 0 | 0 | 2,701 | 2,701 | 5,210 | 2,004 | 336,456 | 302,245 | 111% |
| November | 11 | 38 | 0 | 49 | 2,057 | 254 | 193 | 86 | 2,590 | 2,639 | 0 | 747 | 0 | 747 | 0 | 0 | 0 | 3,077 | 3,077 | 3,386 | -438 | 336,018 | 302,245 | 111% |
| YTD Total | 403 | 819 | 0 | 1,222 | 56,991 | 9,655 | 5,457 | 2,123 | 74,136 | 75,358 | 8,293 | 13,875 | 10,589 | 32,757 | 3,576 | 161 | 376 | 36,727 | 40,840 | 108,115 | 34,518 | 336,018 | 302,245 | 111% |

¹ Enrollments via data sharing between the IOUs.

² Enrollments via data sharing between departments and/or programs within the utility.

³ Enrollments via data sharing with programs outside the IOU that serve low-income customers.

⁴ No response includes no response to both Recertification and Verification.

⁵ For months of March - July, these numbers may reflect a timing gap in which the reporting period captured the current status for each account before the customer protections were put in place. SDG&E has completed an analysis of the accounts reported and reinstating program enrollment where required.

⁶ For the month of September, one account was reported with the incorrect failed PEV status in August status and was dropped in September. An account update is currently in process to reflect the correct account status.

⁷ For the month of July, Failed PEV - The account was finalized on 3/30/2020 and customer received PEV and was dropped. However the discount was not impacted as the customer moved out prior to being dropped.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Table 3A - Post-Enrollment Verification Results (Model)

SDG&E

December 2020

| Month | Total CARE Households Enrolled | Households Requested to Verify ¹ | % of CARE Enrolled Requested to Verify Total | CARE Households De-enrolled (Due to no response) | CARE Households De-enrolled (Verified as Ineligible) ² | Total Households De-enrolled ^{3,5} | % De-enrolled through Post Enrollment Verification ⁴ | % of Total CARE Households De-enrolled |
|------------------|--------------------------------|---|--|--|---|---|---|--|
| January | 300,720 | 533 | 0.2% | 8 | 53 | 61 | 11.4% | 0.0% |
| February | 303,209 | 179 | 0.1% | 3 | 13 | 16 | 8.9% | 0.0% |
| March | 309,365 | 26 | 0.0% | 0 | 2 | 2 | 7.7% | 0.0% |
| April | 315,624 | 0 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| May | 322,381 | 0 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| June | 326,230 | 0 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| July | 329,211 | 1 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| August | 331,398 | 1 | 0.0% | 0 | 1 | 1 | 100.0% | 0.0% |
| September | 333,116 | 0 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| October | 334,452 | 0 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| November | 336,456 | 0 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| December | 336,018 | 0 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| YTD Total | 336,018 | 740 | 0.2% | 11 | 69 | 80 | 10.8% | 0.0% |

¹ Includes all customers who failed SDG&E's CARE eligibility probability model.

² Includes customers verified as over income or who requested to be de-enrolled.

³ Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request.

⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.

⁵ For the month of August, one account was reported with the incorrect failed PEV status. An account update is currently in process to reflect the correct account status.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)

SDG&E

December 2020

| Month | Total CARE Households Enrolled | Households Requested to Verify ¹ | % of CARE Enrolled Requested to Verify Total | CARE Households De-enrolled (Due to no response) ² | CARE Households De-enrolled (Verified as Ineligible) ² | Total Households De-enrolled ^{2,3,5} | % De-enrolled through Post Enrollment Verification ⁴ | % of Total CARE Households De-enrolled |
|------------------|--------------------------------|---|--|---|---|---|---|--|
| January | 300,720 | 238 | 0.1% | 38 | 14 | 52 | 21.8% | 0.0% |
| February | 303,209 | 147 | 0.0% | 2 | 1 | 3 | 2.0% | 0.0% |
| March | 309,365 | 47 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| April | 315,624 | 14 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| May | 322,381 | 1 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| June | 326,230 | 0 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| July | 329,211 | 4 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| August | 331,398 | 2 | 0.0% | 1 | 0 | 1 | 50.0% | 0.0% |
| September | 333,116 | 6 | 0.0% | 3 | 0 | 3 | 50.0% | 0.0% |
| October | 334,452 | 2 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| November | 336,456 | 2 | 0.0% | 0 | 1 | 1 | 50.0% | 0.0% |
| December | 336,018 | 1 | 0.0% | 0 | 0 | 0 | 0.0% | 0.0% |
| YTD Total | 336,018 | 464 | 0.1% | 44 | 16 | 60 | 12.9% | 0.0% |

¹ Includes all participants who were selected for high usage verification process.

² Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

³ Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.

⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.

⁵ For the month of May, 1 account was flagged for HEU and was dropped due to having a commercial rate

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

**CARE Table 4 - CARE Self-Certification and Self-Recertification Applications¹
SDG&E**

December 2020

| | Provided | Received | Approved | Denied | Pending/Never Completed | Duplicates |
|---------------|----------|----------|----------|--------|-------------------------|------------|
| Total (Y-T-D) | 6,424 | 135,906 | 76,355 | 19,037 | 535 | 39,979 |
| Percentage | | 100% | 56% | 14% | 0% | 29% |

¹ Includes sub-metered.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

**CARE Table 5 - Enrollment by County
SDG&E
December 2020**

| County | Estimated Eligible Households[1] | | | Total Households Enrolled[2] | | | Penetration Rate | | |
|--------------|----------------------------------|--------------|----------------|------------------------------|--------------|----------------|------------------|-------------|-------------|
| | Urban | Rural | Total | Urban | Rural[3] | Total | Urban | Rural | Total |
| Orange | 14,908 | 0 | 14,908 | 14,585 | 0 | 14,585 | 98% | 0% | 98% |
| San Diego | 281,284 | 6,053 | 287,337 | 314,051 | 7,382 | 321,433 | 112% | 122% | 112% |
| Total | 296,192 | 6,053 | 302,245 | 328,636 | 7,382 | 336,018 | 111% | 122% | 111% |

[1] As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2020.

[2] Total Households Enrolled includes submeter tenants.

[3] No Rural eligible population exists in Orange County in SDG&E territory, therefore penetration for Orange County Rural is not applicable.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

**CARE Table 6 - Recertification Results
SDG&E
December 2020**

| Month | Total CARE Households | Households Requested to Recertify ^{1,5} | % of Households Total (C/B) | Households Recertified ² | Households De-enrolled ³ | Recertification Rate % ⁴ (E/C) | % of Total Households De-enrolled (F/B) |
|------------|-----------------------|--|-----------------------------|-------------------------------------|-------------------------------------|---|---|
| January | 300,720 | 2,278 | 0.8% | 2,075 | 102 | 91.1% | 0.0% |
| February | 303,209 | 1,232 | 0.4% | 1,122 | 26 | 91.1% | 0.0% |
| March | 309,365 | 346 | 0.1% | 299 | 3 | 86.4% | 0.0% |
| April | 315,624 | 0 | 0.0% | 0 | 0 | 0.0% | 0.0% |
| May | 322,381 | 0 | 0.0% | 0 | 0 | 0.0% | 0.0% |
| June | 326,230 | 5 | 0.0% | 0 | 0 | 0.0% | 0.0% |
| July | 329,211 | 1 | 0.0% | 0 | 0 | 0.0% | 0.0% |
| August | 331,398 | 3 | 0.0% | 0 | 0 | 0.0% | 0.0% |
| September | 333,116 | 1 | 0.0% | 0 | 0 | 0.0% | 0.0% |
| October | 334,452 | 0 | 0.0% | 0 | 0 | 0.0% | 0.0% |
| November | 336,456 | 1 | 0.0% | 0 | 0 | 0.0% | 0.0% |
| December | 336,018 | 1 | 0.0% | 0 | 0 | 0.0% | 0.0% |
| YTD | 336,018 | 3,868 | 1.2% | 3,496 | 131 | 90.4% | 0.0% |

¹ As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2020.

² Data represents total residential electric customers.

³ Includes customers who did not respond or who requested to be de-enrolled.

⁴ Percentage of customers recertified compared to the total participants requested to recertify in that month.

⁵ Customers can manually request to recertify but are automatically placed in the COVID protection category.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

**CARE Table 7 - Capitation Contractors¹
SDG&E
December 2020**

| Contractor | Contractor Type (Check one or more if applicable) | | | | Total Enrollments | |
|--|--|-----|--------|--------|-------------------|--------------|
| | Private | CBO | WMDVBE | LIHEAP | Current Month | Year-to-Date |
| 211 SAN DIEGO | | X | | | 72 | 1520 |
| 211 ORANGE COUNTY | | X | | | - | - |
| ALLIANCE FOR AFRICAN ASSISTANCE | | X | | | 1 | 3 |
| AMERICAN RED CROSS WIC OFFICES | | X | X | | - | 4 |
| CATHOLIC CHARITIES | | X | | | - | - |
| CHULA VISTA COMMUNITY COLLABORATIVE | | X | | | - | 5 |
| COMMUNITY RESOURCE CENTER | | X | | | - | 6 |
| HEARTS AND HANDS WORKING TOGETHER | | X | | | - | - |
| HOME START | | X | | | - | - |
| HORN OF AFRICA | | X | | | - | - |
| INTERFAITH COMMUNITY SERVICES | | X | | | - | 2 |
| LA MAESTRA FAMILY CLINIC | | X | | X | - | 0 |
| MAAC PROJECT | | X | | | 2 | 17 |
| NEIGHBORHOOD HEALTH CARE | X | | | | - | 2 |
| NORTH COUNTY HEALTH SERVICES | | X | | | - | 3 |
| SAN DIEGO STATE UNIVERSITY WIC OFFICES | | X | | | 1 | 13 |
| SAN YSIDRO HEALTH CENTERS | | X | | | - | 13 |
| SCRIPPS HEALTH WIC | | X | | | - | 3 |
| UNION OF PAN ASIAN COMMUNITIES SAN DIEGO(UPAC) | | X | | | - | - |
| VISTA COMMUNITY CLINIC | | X | | | - | 1 |
| Total Enrollments | | | | | 76 | 1,592 |

¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD

**CARE Table 8 - Households as of Month-End
SDG&E
December 2020**

| Month | Gas and Electric | Gas Only | Electric Only | Total | Eligible Households ¹ | Penetration | % Change | Total Residential Accounts ² |
|------------|------------------|------------|----------------|----------------|----------------------------------|-------------|--------------|---|
| January | 189,003 | 0 | 113,142 | 302,145 | 302,245 | 100% | 0.2% | 1,339,591 |
| February | 189,677 | 0 | 113,532 | 303,209 | 302,245 | 100% | 0.4% | 1,341,511 |
| March | 193,868 | 0 | 115,497 | 309,365 | 302,245 | 102% | 2.0% | 1,343,279 |
| April | 197,926 | 0 | 117,698 | 315,624 | 302,245 | 104% | 2.0% | 1,344,556 |
| May | 202,432 | 0 | 119,949 | 322,381 | 302,245 | 107% | 2.1% | 1,346,035 |
| June | 204,834 | 0 | 121,396 | 326,230 | 302,245 | 108% | 1.2% | 1,347,988 |
| July | 206,781 | 0 | 122,430 | 329,211 | 302,245 | 109% | 0.9% | 1,349,590 |
| August | 208,371 | 0 | 123,027 | 331,398 | 302,245 | 110% | 0.7% | 1,351,084 |
| September | 209,527 | 0 | 123,589 | 333,116 | 302,245 | 110% | 0.5% | 1,352,721 |
| October | 210,449 | 0 | 124,003 | 334,452 | 302,245 | 111% | 0.4% | 1,354,730 |
| November | 211,719 | 0 | 124,737 | 336,456 | 302,245 | 111% | 0.6% | 1,355,945 |
| December | 211,579 | 0 | 124,439 | 336,018 | 302,245 | 111% | -0.1% | 1,358,245 |
| YTD | 211,579 | N/A | 124,439 | 336,018 | 302,245 | 111% | -0.1% | 1,358,245 |

¹ As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2020.

² Data represents total residential electric customers.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

**CARE Program Table 9 - Expenditures for Pilots/CHANGES Program¹
SDG&E**

December 2020

| 2020 | Authorized 2020 Budget ² | Current Month Expenses | Expenses Since Jan. 1, 2020 | % of 2020 Budget Expensed |
|-----------------|-------------------------------------|------------------------|-----------------------------|---------------------------|
| | Total | Total | Total | Total |
| CHANGES Program | \$ 267,733 | \$ (3,735) | 228,253 | 85% |
| Total | \$ 267,733 | \$ (3,735) | 228,253 | 85% |

1. Decision 15-12-047 transitioned CHANGES pilot to CHANGES program and funding for the effort is captured herein.
2. Corrected budget from \$265,103 to \$267,733, as the previous budget amount is for PY2019.

NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

| CARE Table 10 CHANGES One-On-One Customer Assistance Sessions San Diego Gas & Electric | |
|---|------------|
| Reporting Period November 2020[1] | |
| No. of attendees at education sessions | 166 |
| Disputes | |
| Add Level Pay Plan | 0 |
| Assisted with CARE Re-Certification/Audit | 0 |
| Changed 3rd party Company/Gas Aggregation | 0 |
| Changed 3rd Party Electricity Aggregation | 0 |
| Enroll in Energy Assistance Programs | 0 |
| High Energy CARE User | 0 |
| Medical Baseline Application | 0 |
| Payment Extension | 0 |
| Payment Plan | 1 |
| Request Bill Adjustment | 0 |
| Request Customer Service Visit | 0 |
| Request Meter Service or Testing | 0 |
| Schedule Energy Audit | 0 |
| Solar | 0 |
| Stop Disconnection | 0 |
| Time of Use | 0 |
| Wildfire Related Issue | 0 |
| Total disputes [3] | 1 |

| Needs Assistance | |
|--|-----------|
| Add/Remove Level Pay Plan | 0 |
| CARE Enrollment | 0 |
| Assisted with CARE Re-Certification/Audit | 0 |
| Assisted with Changes to Account | 0 |
| Energy Efficiency Tool | 0 |
| Assisted High Energy User with CARE Doc Submission | 0 |
| Assisted with Reconnection | 0 |
| Billing Language Changed | 0 |
| Consumer Education Only | 0 |
| Electricity Aggregation | 0 |
| Energy Alerts | 0 |
| Enrolled in Demand Response Programs | 0 |
| ESAP | 0 |
| HEAP/HEAP | 0 |
| Medical Baseline | 0 |
| Neighbor to Neighbor | 6 |
| REACH | 0 |
| Reported Safety Problem | 0 |
| Reported Scam | 0 |
| Set Up 3rd Party Notification | 0 |
| Set Up New Account | 0 |
| Payment Extension | 2 |
| Payment Plan | 2 |
| Wildfire Related Issue | 0 |
| Total Needs Assistance [2] | 10 |

Education: Education sessions were held in a mix of one on one, and group sessions. Education materials are available as fact sheets on the CPUC Website: http://consumers.cpuc.ca.gov/team_and_changes/

Disputes & Needs Assistance -Support was provided in the following languages: Arabic, English, Spanish

[1] There is a one-month lag behind the current reporting month. The data for December 2020 will be reported once received.

[2] Contractor is in the process of validating the total. If there is a discrepancy in the numbers reported, the numbers will be corrected in the February 2021 report.

[3] Per CHANGES Vendor: The total number of services may exceed the total number of cases because some cases will include more than one service provided.

* Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Table 11 CHANGES Group Customer Assistance Sessions

SDG&E

2020 [1,2]

| Date ³ | Session Language | Description of Service Provided (e.g. utility bill assistance, utility bill dispute resolution, and other energy related issues) | Session Logistics | | | |
|-------------------|------------------|--|-------------------|-----------------------------|---------------------|--|
| | | | # of Sessions | Length (Hours) ⁴ | Number of Attendees | Description of Information / Literature Provided |
| N/A | | Avoiding Disconnection | 0 | N/A | 0 | CHANGES Ed Handout |
| N/A | | CARE/FERA and Other Assistance Programs | 0 | N/A | 0 | CHANGES Ed Handout |
| N/A | | Electric and Natural Gas Safety | 0 | N/A | 0 | CHANGES Ed Handout |
| N/A | | Energy Conservation | 0 | N/A | 0 | CHANGES Ed Handout |
| N/A | | Gas Aggregation | 0 | N/A | 0 | CHANGES Ed Handout |
| N/A | | High Energy Use | 0 | N/A | 0 | CHANGES Ed Handout |
| N/A | | Level Pay Plan | 0 | N/A | 0 | CHANGES Ed Handout |
| N/A | | Understanding Your Bill | 0 | N/A | 0 | CHANGES Ed Handout |
| Current Month | | | 0 | | 0 | |
| Year-to-Date | | | 378 | | 1910 | |

[1] This table was provided by CHANGES contractor, Self Help for the Elderly, via CSID. This table was edited and reformatted from its original version in order to have a more consistent appearance and format with existing SDG&E tables.

[2] As of June 1st, 2020, CHANGES one-on-one data reports have moved from monthly to quarterly for the 2020-2021 program contract year. The data for Q2 September 1-November 30, 2020 will be reported once received.

[3] Date of the workshops not available.

[4] Contractor states all sessions last at least 30 minutes.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.